

# **Report on the Response of the George Mason University to the Impact of the Aging of Virginia's Population**

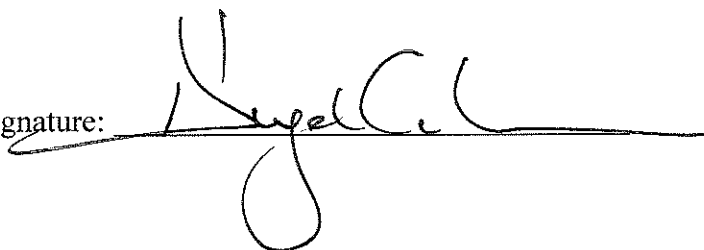
November 14, 2014

Pursuant to Code of Virginia §§ 2.2-5510 and 51.5-136, George Mason University submits this report of its progress in addressing the impact of the aging of Virginia's population.

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Agency Head Signature:

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## **Executive Summary**

George Mason University strives to be an inclusive university for the world. This report will summarize our strategies for preparing for the growth in numbers of older Virginians. Our actions and plans vary based on the needs of our many cohort groups including students, parents, employees and the larger community.

While the vast majority of our largest cohorts, our students, and our employees are under the age of sixty, we serve a growing number of older employees, students and their families each year. In addition, we strive to engage and support our full community which includes the growing older population.

Our recreational and cultural programs are open to Virginians of all ages. We have a robust offering of services including the fine arts, recreation and fitness as well as our primary focus on education. Throughout this report you will find ways that we are working to support older Virginians with developmental opportunities.

Of our many programs, our OSHER Lifelong Learning Institute (OLLI) is the most specifically targeted towards older citizens with a goal of offering intellectual and cultural experiences in the retirement years.

## **Agency Description**

### **MISSION**

A public, comprehensive, research university established by the Commonwealth of Virginia in the National Capital Region, we are an innovative and inclusive academic community committed to creating a more just, free, and prosperous world.

### **OUR VALUES**

#### **Our students come first**

Our top priority is to provide students with a transformational learning experience that helps them grow as individuals, scholars and professionals.

#### **Diversity is our strength**

We include and embrace a multitude of people and ideas in everything we do and respect differences.

#### **Innovation is our tradition**

We strive to find new and better ways to deliver on our mission while honoring time-tested academic values.

#### **We honor freedom of thought and expression**

We protect the freedom of all members of our community to seek truth and express their views.

**We are careful stewards**

We manage the economic and natural resources entrusted to us responsibly and sustainably.

**We act with integrity**

We hold ourselves to the highest ethical standards as educators, scholars, students and professionals.

**We thrive together**

We nurture a positive and collaborative community that contributes to the well-being and success of every member.

**THE MASON GRADUATE IS...**

**...an engaged citizen:**

- ethically oriented and committed to democratic ideals
- respectful of individual differences, rights and liberties
- knowledgeable of important issues affecting the world
- focused on the well-being of others, today and tomorrow
- committed to building a just society

**OUR COMMITMENTS**

The areas that will drive our attention, our innovation and our investments over the next decade:

**Innovative learning**

- We will apply new and emerging learning technologies, environments and methods to improve learning effectiveness and student completion, and to better serve the evolving needs of students, working professionals, and public, private and nonprofit organizations.

**Research of consequence**

- We will expand research as a central element of our mission; we will translate our discoveries into interventions and applications with social, cultural and economic impact.

**Economic and cultural engine**

- We will act as a catalyst for the economic and cultural vibrancy of our region, as a growing source of talent in high demand disciplines, as an incubator of business and social enterprises, as a hub of life-long learning, arts and athletics, and as a research and learning partner for public, private and nonprofit organizations.

**Engagement with the world**

- We will prepare our students to thrive in a global context by infusing global awareness, citizenship values and learning opportunities across all fields; and we will partner with other organizations in solving global problems where our impact will be highest.

**Sound investment**

- We will be a valuable investment for our students, taxpayers and donors by focusing on outcomes, operational efficiency and affordability. Specifically, we will:

- ° expand the number of graduates, the career prospects for our graduates, the impact of our research, and the value we provide to our community.
- ° be sensitive to trends in household income in making decisions about tuition and financial aid.

### **Enriching work environment**

- We will invest in recruiting, retaining and developing talented and diverse faculty and academic and professional staff. We will prioritize the well-being of our community and will create a vibrant campus life in which all members can grow and thrive.

### **Foundation for the future**

- We will aggressively seek additional sources of funding through higher levels of philanthropy; expanded online, certificate and executive programs; research grants; and the commercialization of intellectual property.
- We will also increase our engagement with our alumni, strengthen the Mason brand nationally and internationally, and effectively communicate Mason's value to stakeholders throughout Virginia and the National Capital Region.

### **Information Requested**

**1. If your agency has undertaken any actions to respond to the current and future impact of an aging population, such as needs assessments, strategic planning, or use of best practices, please briefly describe those actions. Please indicate what assistance from DARS could help your agency as it prepares to serve an aging Virginia population.**

Below is a review of our actions and plans for the various programs:

OLLI - The Osher Lifelong Learning Institute is an affiliate of George Mason University providing educational, social and cultural opportunities to older residents (mostly 50 plus) in Northern Virginia. Mason's OLLI Board, OLLI members and the OLLI executive director regularly participate in the meetings of local and regional committees dedicated to assessing the needs of the aging population. Examples include the Fairfax County Commission on Aging, Long Term Care Coordinating Council, Agency on Aging, Jewish Council on Aging and the Association for the Advancement of Retired People. We are currently assessing our OLLI parking and classroom needs in light of recent and anticipated growth in membership due to the surge in baby boom retirees who are choosing to age in place in Northern Virginia.

Recreation - Our recreation department has discussed this age group with the City of Fairfax Recreation and have been involved in their survey of residents and senior citizen facility needs and locations. We are jointly considering where and how each of us may balance the city and universities locations and programs. We expect we will target marketing of facilities, services and programs during current non-peak recreational hours (space available- early, 9-11 a.m. and 1-3 p.m. M-F) to this demographic.

Performing Arts - We draw a large number of patrons from retirement communities in the immediate community. At the Hylton Center we are responding to this demographic fact by creating specific programming initiatives such as Matinee Idylls, offering daytime lunch performances. These have served more than 1,000 patrons in two and half seasons to date. In addition we have altered start times on some performances at both the Center for the Arts (CFA) and the Hylton Center to 2:00, 3:00, or 4:00 p.m. to meet the desire to avoid driving at night time. Additionally, both CFA and the Hylton Center have large volunteer participation in various aspects such as "Friends of..." committees, usher corps, and administrative assistance. The predominant demographic in these groups is citizens age 60-74 years.

**2. Briefly describe your agency's services that are used primarily by older Virginians and the funding streams (types and amounts) that support those services. If these particular services or funding streams are provided in conjunction with other state or local agencies or other for profit or non-profit organizations, please list them.**

Mason's services are on the whole, primarily used by younger citizens.

OLLI - All of OLLI's services are designed by and for older Virginians as described above. OLLI is funded through the following:

- a) Endowment. The Bernard Osher Foundation has provided two \$1 million endowments to the George Mason Foundation to support OLLI-Mason. Under the terms of the grant agreement, OLLI has use of the earnings on that endowment. This varies per year, but is stipulated as a minimum of five percent of corpus.
- b) Membership Fees. Members pay an annual fee, currently set at \$375/year, (special one-time introductory membership fee of \$150 for one term).
- c) Donations. Members donate throughout the year to the "Friends of OLLI" Fund, the use of which is decided by the OLLI Board of Directors. A portion of the Fund is often used to purchase upgrades to AV/electronics equipment or other facility enhancements.
- d) Volunteer Service. OLLI is a volunteer run organization with only a few paid part-time staff to sustain operations. The Board of Directors, program and committee officers and teachers all donate their time. We consider this a funding stream that is impossible to value.

**3. Identify current agency programs specifically designed to serve older Virginians that fall into any of the following eight categories:**

- Health Care/Wellness
- Education
- Public Safety (including Adult Abuse Prevention)
- Recreation
- Housing
- Accessibility (including Livable Communities <http://www.vadrs.org/vblc/>)
- Financial Security
- Transportation

Mason programs that serve older Virginians include:

Coursework to educate those who support older Virginians - George Mason University, College of Health and Human Services, Department of Health Administration and Policy, offers an undergraduate concentration in Assisted Living/ Senior Housing Administration. This is the nation's first and only curriculum dedicated solely to this rapidly growing field. The concentration is designed to provide graduates with the operational, marketing, resident care, and hospitality services skills required to become effective leaders and managers of assisted living and related senior housing communities. Equally important, the program provides exposure to and understanding of the unique philosophy of assisted living/senior housing relative to choice, dignity, autonomy, and quality of life for older adults. The concentration requires dedicated coursework in senior housing management and operations, senior housing sales & marketing, two courses in gerontology or related issues of aging topics, and a full semester internship within a senior housing community or senior's industry-related organization.

Senior Citizen Tuition Waivers – Mason encourages our older citizens to remain engaged and supports their interest in life-long learning. Virginia residents, age 60 and over, are eligible to audit up to three academic credit courses per semester for no tuition or fees<sup>1</sup> and may earn academic credit for classes with no tuition if they have a taxable income not exceeding \$15,000 for Virginia income tax purposes for the year preceding enrollment.

<http://registrar.gmu.edu/topics/senior-citizen-waiver/>

OLLI: OLLI-Mason offers more than 350 classes per year over four terms covering all of the topics outlined above and more. Courses and special events fall under the following eight categories: art and music; economics and finance; history; literature, theater and writing; languages; religious studies; humanities and social sciences; current events; science, technology and health. From Latin to archaeology, religion to computers, all of the classes are designed by OLLI members for OLLI members based on expressed areas of interest.

Following are examples of classes from the Fall 2014 term that specifically address each of the above categories: “Workshop for Planning Your Life after Retirement,” “Meditation,” “Cybercrime and Digital Privacy,” “iPad for Beginners,” “Advances in Medical Care,” “Beginner Chen-Style Tai Chi,” “How to Boost Your Brain to Combat Aging,” “Personal Computer Safety,” “Ten Advantages of Aging for Psychological Health,” and “Education and Technology.” Some classes and special events from past or upcoming terms include: “AARP Driver Safety,” “Retired with Questions” (touching on aging in place and home finance), “Thriving in Place as You Age,” and classes on options for assisted living, and Washington DC metro transit system updates. For a full list of 2014 course offerings, please consult the OLLI course catalogs which are posted on the OLLI website at [olli.gmu.edu/current-catalog-fall-2014/](http://olli.gmu.edu/current-catalog-fall-2014/)

Because OLLI-Mason is member run, it provides a myriad of community service and leadership opportunities for the senior population. Most OLLI instructors are OLLI members with a

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<sup>1</sup> Except fees established for the purpose of paying for course materials or lab fees.

professional or personal expertise in an area of interest. OLLI members also have created and lead dozens of clubs on topics such as: books (reading), bridge, cooking, crafts, history, Homer, iPad users, Mah Jongg, recorder consort, investment, photography, classic fiction, memoir writing, daily news, walking, knit/needlework, Tai Chi, travel and personal computer use. OLLI holds numerous parties and social gatherings to foster community and friendship within its ranks.

Also of note, OLLI's affiliation with George Mason University accords members certain university privileges such as discounted use of recreational facilities and discounted tickets to many performing arts programs. OLLI regularly works with Mason to design and develop collaborations to benefit OLLI members, such as volunteer opportunities and board representations at the University. Because of these synergies, OLLI members regularly donate to Mason programs.

**4. Is your agency able to meet all of the service demands of older Virginians for the services listed above? If there are any instances where the demand for services exceeds your agency's ability to meet the demand, please indicate the service and the extent of the unmet demand. Also, if your agency maintains waiting lists for services, please provide this information, including the waiting list numbers for each service.**

Most of Mason's services and programs are for people of all ages, as such we do not have a specific unmet demand for services to the older Virginians.

Performing Arts - We continue to see an increase in the number of elderly patrons who need accessible parking. We anticipate this trend to continue as well as an increase in the number of patrons requesting accessible seating, large print programs, assistive listening devices, and in some cases closed captioning due to age. These increases will require the Center and the University to consider expanding accessible programs beyond the guideline numbers to meet the demands of this segment of our patrons. We also maintain active outreach to the Osher Lifelong Learning Institute in Fairfax/Reston/Loudoun and the Lifelong Learning Institute in Manassas.

OLLI - Membership in OLLI-Mason has boomed since its foundation in 1991. OLLI began with only 100 members (known then as Learning in Retirement Institute) and 14 classes, and now it boasts nearly 1200 members and over 350 classes per year. Not only has OLLI expanded the number and breadth of its courses to accommodate the increased interest, OLLI has extended its campuses from just Fairfax (Mason-Fairfax campus) to locations in Reston and Loudoun (Mason-Loudoun campus). OLLI makes every effort to ensure members receive all of their class selections and tries to avoid waitlists. For one annual fee, members can take as many classes as they wish, space permitting. This creates a huge demand. To accommodate this, OLLI often rents classroom space at nearby churches or community centers if more room is needed to fit all interested students into a class. On few occasions, however, OLLI finds it has to run a waitlist for a class.

Recreation - The fitness and aquatic centers at the Fairfax and Prince William campuses have the capacity to serve all interested seniors. Membership is required. There is currently no waiting list for membership at any of the facilities. Senior citizens 65 and older are able to take

classes at George Mason provided there is space in the class. Unfortunately, Mason's rapid growth over the past decade has provided little space for senior citizens. There is often a waiting list for classes and senior citizens are included on those wait lists.

**5. Provide the number of persons, by gender if available, who received services from the agency in each of the past five state fiscal years (FY 2010 through FY2014) who fell into the following age ranges: 60-64; 65-74; 75-84; and 85 and older. If your agency lacks specific information about the numbers of older Virginians it serves but has other evidence indicating that it is serving more or fewer older Virginians than it has in the past, please describe the basis for that estimation.**

Mason is seeing a gradual increase in the number of registered students over the age of 60. 2013 was 2.5% higher than 2012 and 2014 was 2.8% higher than 2013. Data by gender is incomplete:

ACADEMIC YEAR	<60	60-64	65-74	75-84	85+	Grand Total
2012	41,584	670	448	94	17	42,813
2013	40,134	660	482	106	12	41,394
2014	37,058	649	523	113	10	38,353
Grand Total	118,776	1,979	1,453	313	39	122,560

Recreation – Below is our older membership population broken by age and sex.

Age	Count	% Male
60-64	63	49%
65-74	84	64%
75-84	17	70.5%
85+	4	50%
Total 60+	168	59%

OLLI - As of Fall Term 2014, OLLI-Mason has 1178 members. OLLI does not capture, however, gender and age specific information from members. We have deduced from OLLI-Mason G # applications (those who choose to apply for Mason IDs and benefits) that the average age at OLLI is 71, with a relatively equal representation of women and men.

**6. Referring to the services or funding you described in item two, describe any services or funding provided to older Virginians for which the accessibility or availability varies considerably in different parts of the Commonwealth.**

Mason is a campus based institution but we have expanded further out into Northern Virginia. In addition to our campus in Fairfax, Virginia, we have campuses in Arlington, Prince William and Loudoun with regular courses, OLLI programs as well as arts and recreation at multiple locations.

**7. Over the next five to 10 years, in what ways do you anticipate that an aging population will impact your agency's services, funding streams, or policies? Consider the impact from**



**an increase in the number of older Virginians and whether the needs of older Virginians will differ from those of today's older adults. Please include any anticipated impacts upon the cost of services, changes in type of services or the manner of service delivery, or modifications to agency policies, staffing needs, or procedures.**

OLLI - As noted in the answer to question #4, OLLI-Mason is constantly reassessing its programs and operations to meet the current and future demands of the aging population in northern Virginia. The senior population in northern Virginia is growing fast. According to Fairfax County Board Supervisor Pat Herrity, by 2030, over 385,000 county residents will exceed age 50 and 105,000 will exceed age 70, an increase of 88 percent over 2005.

OLLI is currently assessing its facilities with an eye toward upgrading capacity to meet the anticipated growth in demand. As programming is member driven, OLLI anticipates that class offerings will change to meet the changing needs of the senior populations, perhaps providing more guidance and information about aging in place, long-term care options, and healthy mind and body lifestyles. Certainly, should membership grow significantly, there may be a need for additional staffing support.

**8. Please describe the primary steps that should be taken at the federal, state, or local levels to meet the future demands of older Virginians and to make services delivery more effective and efficient.**

No suggestions.

**9. Identify the extent to which your agency provides "customer-oriented" publications and websites that are designed to be "senior-friendly." If the information you currently provide is not readily accessible to older Virginians, please identify any steps your agency is taking to improve their access to this information.**

George Mason's commitment to providing websites and publications that are fully ADA compliant ensures that senior citizens will find them "senior friendly" and no further action is contemplated.

Performing Arts - We offer large print playbills in response to patrons that have difficulty reading the smaller print. We use about a 3-4 per concert. In addition we offer assistive listening devices and find the majority of users are our older patrons. A small number of programs offer closed captioning, but this is more often due to a specific disability request than a general demographic trend.

OLLI - We maintain a user-friendly website ([olli.gmu.edu](http://olli.gmu.edu)) that hosts information on OLLI's operations, membership, programs, classrooms/locations, volunteer opportunities, etc. It also offers an array of student and instructor resources, newsletters, forms, and manuals, and it provides external links to Mason and important senior services and resources such as Meals on Wheels, Ride Share, AARP and Roads Scholar. The website was recently updated with step by step instructions for seniors on how to audit classes at George Mason or other public universities

in Virginia. The OLLI website links to a secure OLLI member portal that hosts password-protected information, including the class registration system, membership directory and member profiles.

OLLI offers many publications geared toward our membership. The newsletter, printed weekly during term, includes articles on OLLI administration, classes, upcoming events, public interest, member spotlights, clubs and poetry. OLLI's weekly communicator is read in classrooms during term with up to date announcements for members. OLLI also offers a variety of membership materials such as a handbook, brochure, course catalog, etc.

**10. Describe any other services or programs that your agency plans to implement in the future to address the impact of the aging of Virginia's population.**

OLLI continues to work to look for new opportunities to develop or strengthen collaborations with retiree-focused organizations to better serve the needs of members. For example, we have been working recently with AARP on programs for OLLI members provided by AARP or lead by AARP instructors. OLLI also is working to create membership collaboration with Shepherd Centers in northern Virginia, non-profits that help older Virginians, including lower income residents, age in place.

**11. Please indicate if your agency is experiencing an increase in employees retiring later and describe any actions your agency is taking or plans to take to accommodate its aging workforce with innovative practices.**

We are not seeing much change in our retirement age. Our average retirement age is staying steady at about 64 for classified employees and administrative faculty and at about 67 for tenured faculty.

Average of Age at Retirement	FY					
Group	FY10	FY11	FY12	FY13	FY14	Grand Total
Classified	63.6	63.5	64.7	62.9	65.0	64.1
Admin Faculty	61.5	65.5	66.5	65.1	65.5	64.9
I/R Faculty	67.3	66.8	67.5	67.8	67.6	67.4
Grand Total	64.4	65.3	66.0	65.7	66.2	65.6

Mason offers a number of services to help our employees to prepare for retirement. We have developed a pre-retirement program for faculty which provides one-on-one retirement coaching by certified retirement coaches from the university, seminars addressing the psychosocial aspects of retiring as well as, health insurance, Social Security and Medicare.

In addition, faculty can select a *Faculty Retirement Transitions Leave* program which allows faculty who meet certain criteria and have 15+ years of service to reduce their course load one year prior to retirement. Faculty with 25+ years of service are able to do the same for two years prior to retirement. This allows faculty some flexibility as they transition into retirement.

Mason continues to support and engage employees who have retired by offering many continuing benefits, such as use of library, complimentary parking, a Mason email address, discounts to athletic and cultural arts programs and more. We hope to keep them engaged in the Mason community. We assisted in the creation of the newly formed Retired Faculty Association, which offers events on and off campus each month for retired Mason faculty. We are in the process of recruiting retired staff who have an interest in forming their own retired staff association. We plan to provide support, as we did with the Retired Faculty Association, as the retired staff association is being formed.

For faculty and staff who want to remain in their professions beyond the traditional retirement age, Mason offers a flexible work environment including flextime, compressed work schedules, job sharing, telework and remote work options.

The campus environment is vital and engaging, providing opportunities for meaningful work for faculty and staff of all ages. Mason values our employees as they offer their years of experience and professional skills which enhance our community.